

Income Tax Return Checklist

Income

- Interest received from your bank accounts.
- Dividends received or reinvested, including any franking credits attached as per the dividend statements provided by the company.
- Distributions from partnerships and trusts, as per the annual tax statement provided by the partnership or trust.
- Details of the sale or purchase of any assets, such as shares and property. This includes dates and cost of purchases and disposals, as per purchase and sale documents.
- Rental Income and Expenses from investment properties, including the real estate agent annual statements and expenses incurred personally.
- Details of any foreign source income (including overseas pensions), foreign assets held and any foreign taxes paid.
- Income and expenditure from any business activities undertaken during the year. Including payroll reports where relevant.

Deductions

- Details of work-related motor vehicle travel (in kilometres). Please note this excludes travel between your home and place of work. And, if you have kept a logbook, details of motor vehicle expenses incurred (including registration, insurance, fuel and servicing).
- Other work-related travel expenses, such as parking, taxis, public transport and tolls.
- Purchase of compulsory uniforms, occupation specific clothing or protective clothing (including hats and sunglasses for outdoor work), and laundry costs for these.
- Self-education expenses, including fees, books, stationery, travel and parking.
- Memberships to industry and professional organisations, union fees, registration costs and subscriptions to industry specific publications, books or journals.
- Purchase of tools and equipment (including stationary) for work-related purposes.
- Details of the periods you worked from home and the hours per week.
- Details of equipment purchased to enable work from home (i.e. computer equipment, desk or office chair) including the cost and date of purchase.
- Details of telephone and internet monthly costs and the proportion of their use that is work-related. Please note this is the work-related use compared to overall household use.
- Attendance fees and travel for work-related seminars, conferences and conventions. Including the cost of flights, accommodation, public transport, taxis and meals.
- Donations made to registered charities.
- Income protection insurance or professional indemnity insurance premiums paid.
- Expenses incurred in relation to management of your investments. Including advisor fees, subscriptions to investment publications, interest on related loans or any other investment related expense.
- Details of any voluntary superannuation contributions (after-tax contributions) you have made that you wish to claim a tax deduction for. Please provide a copy of the acknowledgement of notice of intent to claim a deductible superannuation contribution provided by your superannuation fund. Please note salary sacrificed contributions are already accounted for by your employer.